



# BCRS Management Information System Solution (BMISS)

*NHSC Primary Care Office (PCO) Portal  
Submit NHSC Site Application  
User Guide*

April 7, 2010



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## **Introduction: Primary Care Officer Portal User Guide**

**Goal:** A State Primary Care Officer (PCO) will be able to review a site application and submit a recommendation for a site applying to the NHSC.

### NHSC Site Application Process

1. Submit Site Application Online
2. PCO Review and Recommendation
3. Regional Office Review and Final Decision

At the completion of this process the a site's application has been reviewed by their State Primary Care Officer and have received a recommendation for the NHSC.

**Preconditions:** Before the PCO can submit a recommendation, a site administrator must complete and submit a site application.



## **Section 1: Site Application Process Diagram**

DRAFT



## Section 2: PCO Portal Account Management

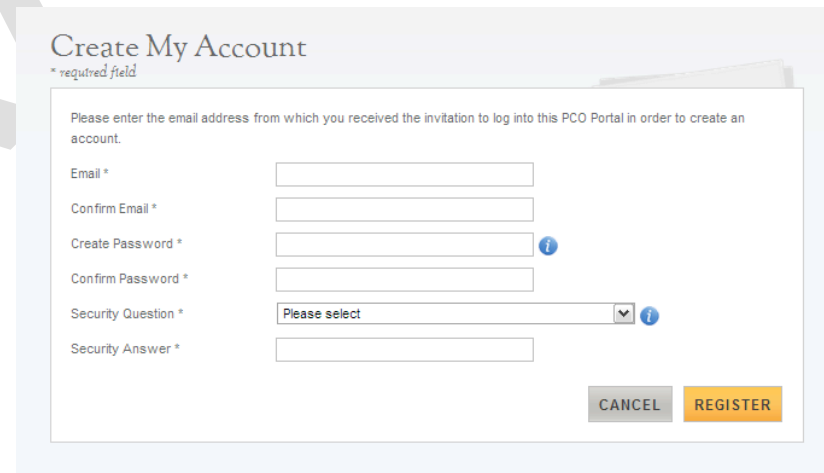
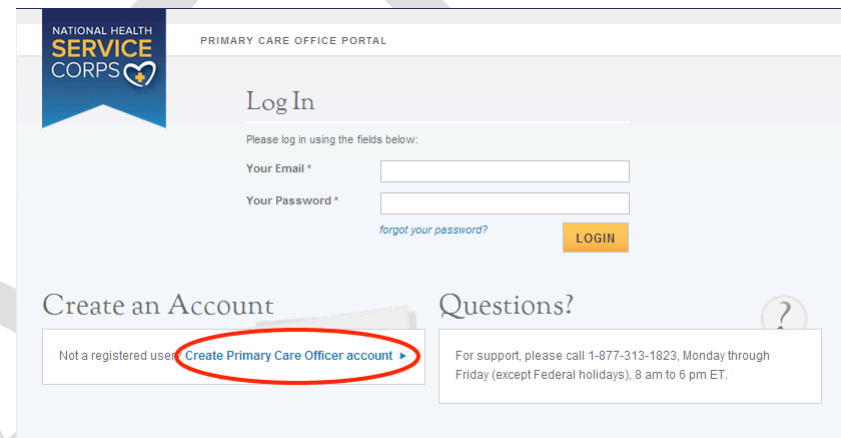
### Creating an Account

Only NHSC recognized PCOs will be able to register accounts on the PCO portal. When registering for a PCO Portal account, the State PCO must use the email address NHSC has on file for the registration.

#### Steps:

1. Navigate to the NHSC Primary Care Officer Portal
2. Select [“Create Primary Care Officer Account”](#)
3. Complete the fields on the “Create My Account” page
4. Select **REGISTER**


Note: The user will receive a confirmation message when their registration is successful. An email is also sent to the email address used to register. Use the link in the email to activate the account. The account will be inaccessible until activated.



## Logging into the PCO Portal

Only users that have created an account in the NHSC PCO Portal will be able to log in. If you have not created an account please reference the previous section “Creating an Account”

### Steps:

1. Enter the email address registered with the account
2. Enter the password
3. Select 

NATIONAL HEALTH  
SERVICE  
CORPS


PRIMARY CARE OFFICE PORTAL

### Log In

Please log in using the fields below:

Your Email \*


Your Password \*

[forgot your password?](#) 

### Create an Account

Not a registered user? [Create Primary Care Officer account >](#)

### Questions?



For support, please call 1-877-313-1823, Monday through Friday (except Federal holidays), 8 am to 6 pm ET.

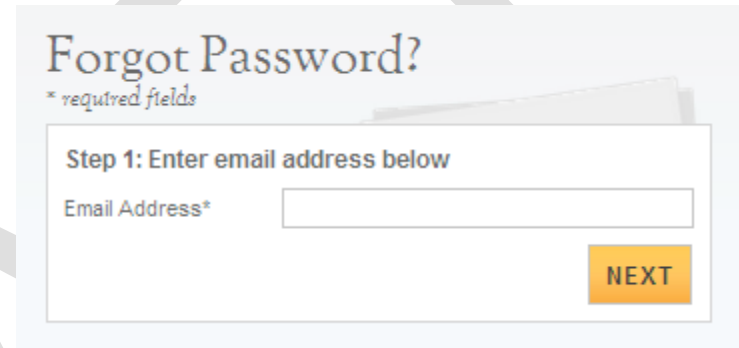


## Retrieving a Lost or Forgotten Password

The system will lock an account after three (3) unsuccessful login attempts. In the event that the user has either lost or forgotten their password and are locked out of the system, use the following steps to reset the password.

### Steps:

1. Select the “Forgot Your Password?” link on the login page
2. Enter the email address used to register your account, select **NEXT**
3. Answer the security question you created during registration, select **SUBMIT**
4. Check you email for a link to reset your password

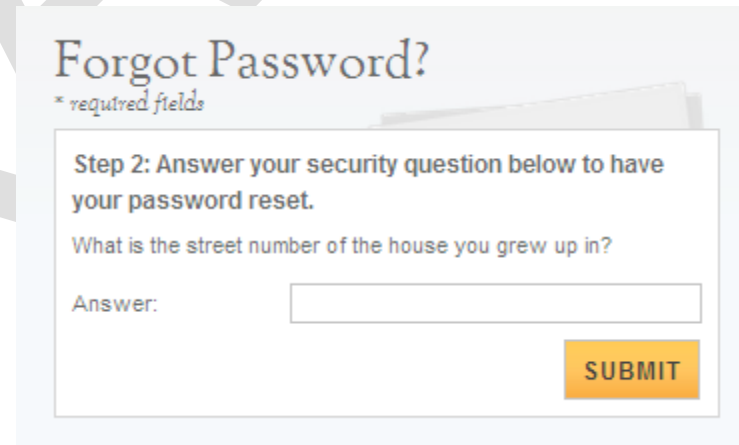


**Forgot Password?**  
*\* required fields*

**Step 1: Enter email address below**

Email Address\*

**NEXT**



**Forgot Password?**  
*\* required fields*

**Step 2: Answer your security question below to have your password reset.**

What is the street number of the house you grew up in?

Answer:

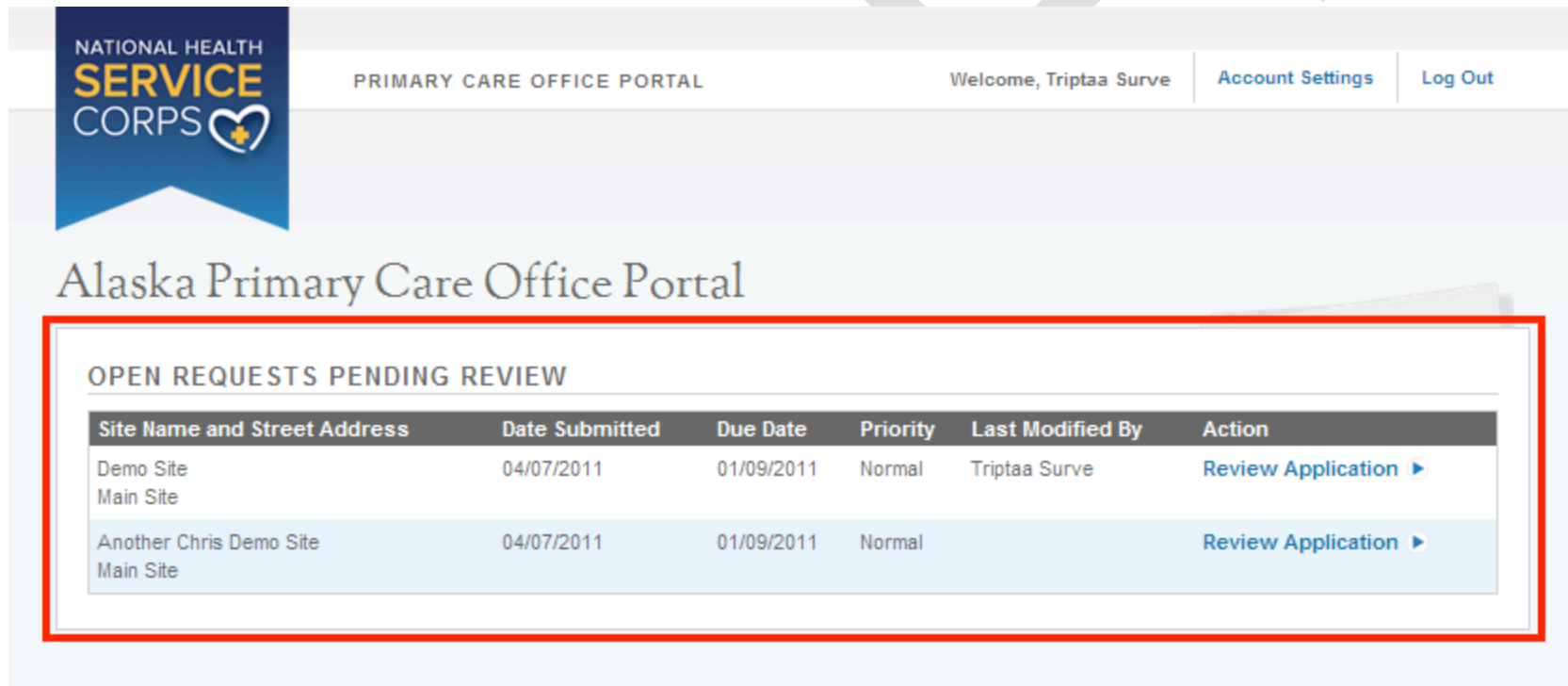
**SUBMIT**



## Section 3: Reviewing an Application

### Choosing an Application from the Task List

On the PCO Portal landing page the PCO is presented with a task list of applications awaiting their review. All tasks that are either awaiting or under review by the PCO will appear in this list. In order to begin reviewing a site application, select “Review Application” for the site in the list you wish to review.



The screenshot displays the Alaska Primary Care Office Portal. At the top left is the National Health Service Corps logo. The header includes the text "PRIMARY CARE OFFICE PORTAL" and a user greeting "Welcome, Triptaa Surve" with links for "Account Settings" and "Log Out". The main heading is "Alaska Primary Care Office Portal". Below this, a section titled "OPEN REQUESTS PENDING REVIEW" contains a table with two rows of application data. The first row is for "Demo Site Main Site" and the second is for "Another Chris Demo Site Main Site". Both rows have a "Review Application" link with a right-pointing arrow. The table columns are: Site Name and Street Address, Date Submitted, Due Date, Priority, Last Modified By, and Action.

Site Name and Street Address	Date Submitted	Due Date	Priority	Last Modified By	Action
Demo Site Main Site	04/07/2011	01/09/2011	Normal	Triptaa Surve	<a href="#">Review Application ▶</a>
Another Chris Demo Site Main Site	04/07/2011	01/09/2011	Normal		<a href="#">Review Application ▶</a>





## Reviewing the Site Information

The first page of the application is the “Site Information” page. Here the user can review and edit any incorrect information before proceeding.

### Steps:

1. Review each field, editing as necessary
2. Select **CONTINUE** to proceed to the next page.

### Save for Later:

At anytime while reviewing the application, the user can select **SAVE FOR LATER**. All the current information on the form is saved and the user is returned to the task list.

The screenshot displays the 'PRIMARY CARE OFFICE PORTAL' interface. The top navigation bar includes the 'NATIONAL HEALTH SERVICE CORPS' logo, a welcome message for 'Triptaa Surve', and links for 'Account Settings' and 'Log Out'. Below the navigation bar, a breadcrumb trail shows 'Home' and 'Site Application Recommendation'. A progress indicator shows four steps: '1 Site Information' (active), '2 HP SA Information', '3 Supporting Documents', and '4 Recommendation'. The main form is titled 'PRACTICE SITE NAME AND LOCATION: (Where the NHSC clinician will serve their obligation)'. It contains various input fields for site details, including Name, Address, State, County, City, Zip, Phone, Fax, Email, and Website. There are also radio buttons for 'Site Location' (Frontier, Urban, Rural) and a dropdown for 'Site Classification'. A checkbox indicates if there is a waiting applicant. At the bottom, a table lists 'SITE POINTS OF CONTACT' with columns for Name, Type, Title, Address, Phone, and Email. The table shows one contact: Chris Kinter, Recruitment Contact, Director, 123 Main Street, Somewhere, AK 99999, 9718827887, ckinter@saapiet.com. At the bottom right of the form are two buttons: 'SAVE FOR LATER' and 'CONTINUE'.

PRIMARY CARE OFFICE PORTAL

Welcome, Triptaa Surve | Account Settings | Log Out

Home > Site Application Recommendation

1 Site Information 2 HP SA Information 3 Supporting Documents 4 Recommendation

PRACTICE SITE NAME AND LOCATION: (Where the NHSC clinician will serve their obligation)

Site Name:\* Demo Site

Address Line 1:\* 123 Main Street

Address Line 2:

State/Province/Region:\* Alaska

County: Yakutat

City:\* Somewhere

Zip/Postal Code:\* 99999

Site Phone Number:\* (971) 862-7778

Site Fax Number: (971) 533-8767

Site E-mail Address:

Site Web Address:

Site Location:\*  
☒ Frontier  
☐ Urban  
☐ Rural

Site Classification:\* Private Non-Profit

Type of Site:\* FQHC Look-Alike

Is there an NHSC applicant waiting for this site to be approved?\* ☒ Yes ☐ No

Waiting Applicant's Name \* John Smith

DUNS #: 123456789

☒ Mailing Address is Same as Practice Site Name and Location

SITE POINTS OF CONTACT

Name	Type	Title	Address	Phone	Email
Chris Kinter	Recruitment Contact	Director	123 Main Street Somewhere, AK 99999	9718827887	ckinter@saapiet.com

SAVE FOR LATER CONTINUE



## Selecting Health Professional Shortage Areas (HPSA)

Each application requires HPSAs to be identified for the site in order to verify that it is eligible to be part of the NHSC. Only sites that reside in at least one valid HPSA are eligible to be a part of the NHSC. New to the online process, the State PCOs will be responsible for selecting HPSAs on each site application.

### Steps:

1. Click the link for the “HPSA Find Tool” to search for valid HPSAs (external web page)\*
2. Enter the HPSA ID and select **ADD**
3. When finished entering HPSAs for the site, select **CONTINUE**

### HPSA Rules:

1. A site must be assigned at least one (1) HPSA
2. A site may not be assigned more than six (6) HPSAs
3. A site may not be assigned more than one (1) HPSA of each type (e.g. Primary Medical Care, Dental, and Mental Health), unless one of the HPSAs is an Auto-HPSA.

**Verify, Edit and Add HPSAs**

Please verify that the information submitted on the application is correct. If any of the information needs changing, please edit the information as necessary (a record of the information changed will be automatically saved).

**HPSA INFORMATION**

Please input the HPSA IDs of the HPSAs which are applicable to the Demo Site, 123 Main Street, Somewhere, AK 99999. The correct HPSA IDs can be found using the [HPSA Find tool](#). You will not be able to recommend the site for approval without a HPSA as all eligible sites must reside in a HPSA.

HPSA ID	Name	Auto-HPSA	Score	HPSA Discipline	Status	Action
102240	Southeast Fairbanks	No	10	Primary Care	Designated	<b>DELETE</b>

Enter the HPSA ID  **ADD**

**SAVE FOR LATER** **CONTINUE**

*\*The HPSA Find Tool is an online tool furnished by the Health Resources and Services Administration (HRSA) that allows the user to search for HPSAs by address. For information on using the HPSA find tool, refer to documentation on the tool site.*



## Reviewing and Uploading Supporting Documents

Each application requires supporting documentation in order to prove NHSC eligibility. Site Administrators may have either uploaded or faxed documents for review. On this page, the PCO has the opportunity to review any uploaded supporting documents and to upload any additional documentation faxed to the PCO by the site administrator.

### Steps:

1. Review uploaded documents
2. Upload any faxed documents to the application  
*All documents required for the site will need to be uploaded before a PCO recommendation can be submitted*
3. Select **CONTINUE** to proceed to the next page

Note: If the Site Administrator faxed hard copy of any of the supporting documents, the message in the red box will appear on this page. This notification informs the PCO to expect some documents related to this application to be faxed.

Note: The “Site Visit Report” (see red oval) is a document unique to PCOs and BCRS Regional Officers. If a site visit was performed a Site Visit Report will be required.

NATIONAL HEALTH SERVICE CORPS  
PRIMARY CARE OFFICE PORTAL  
Welcome, Triptaa Surve | Account Settings | Log Out

Home > Site Application Recommendation

1 Site Information 2 HPSA Information 3 Supporting Documents 4 Recommendation

### Supporting Documents

**4** The Site Administrator has indicated that missing required documents would be submitted by fax, mail or electronically at a later time. Please upload any documents you may have received for this application.

Please upload any additional documents required for this site application.

#### UPLOAD DOCUMENT

1. Select the type of document you are uploading.  
2. Browse for the file on your computer using the dialog box below.  
3. Select the Upload Document button. The document will then appear on the table below. Repeat these steps for each document you wish to upload to your application.

#### SELECT DOCUMENT TYPE(S):

More information about required documents, including samples or templates can be found on the [NHSC Sites and Communities Page](#).

- ☐ Sliding Discount Fee Schedule
- ☐ Proof of Practice (commercial lease agreement, state facilities license, articles of incorporation, or business license)
- ☐ Recruitment and Retention Plan (if available)
- ☐ Proof of appropriate referral for ancillary, specialty, and inpatient care (MOU, letter from specialty care facility/provider, proof of admitting privileges, etc.)
- ☐ Other Documentation Requested by NHSC or State Recommendation Authority
- ☐ Site Visit Report

Comment (Required if Other documentation selected)

No file chosen

#### UPLOADED DOCUMENTS

File Name	Document Types	Comments	Action
Sample Supporting Document.doc	<ul style="list-style-type: none"><li>Sliding Discount Fee Schedule</li><li>Proof of appropriate referral for ancillary, specialty, and inpatient care (MOU, letter from specialty care facility/provider, proof of admitting privileges, etc.)</li></ul>		<input type="button" value="DELETE"/>



## Submitting a Site Recommendation

The final step in the PCO review is submitting a recommendation for the site. The PCO will have to complete a table of verification criteria before submitting a recommendation.

### Steps:

1. Select the box next to “Site Visit Recommended” to flag the site as needing a site visit
  - a. If a site visit has been completed, select the box next to “Site Visit is Complete” and enter the date of the site visit in the box

*Note: If “Site Visit is Complete” is checked, a Site Visit Report must be uploaded on the Supporting Documents page in order to submit an application.*
2. Complete the verification table (see next page for detail)
3. Select recommendation for the site (e.g. Yes, No or Defer to NHSC)
 

*Deferring to NHSC sends the application to the appropriate BCRS regional office without an application from the PCO.*
4. Enter a comment in the box provided
5. Select **SUBMIT RECOMMENDATION**

Note: Once a recommendation has been submitted, the user will be returned to the landing page. A confirmation message will be shown and the site’s application will be removed from the task list.

**NATIONAL HEALTH SERVICE CORPS**

PRIMARY CARE OFFICE PORTAL

Welcome, Triptaa Surve | Account Settings | Log Out

Home | Site Application Recommendation

Site Information | HPSA Information | Supporting Documents | **Recommendation**

### Submit Site Recommendation

\* required fields

Please verify that the information submitted on the application is correct. If any of the information needs changing, please edit the information as necessary (a record of the information changed will be automatically saved).

**SITE VISIT**

☐ Site visit is recommended  
☐ Site visit is complete

Item	Verification Method	Verification Outcome	Last Modified By
Site adheres to sound fiscal management policies	Select...	Select...	
Site did provide PCO with documentation needed to determine compliance	Select...	Select...	
Site has a sliding fee schedule signage posted notices and Medicare/Medicaid SCHIP enrollment	Select...	Select...	
Site has credentialing documentation	Select...	Select...	
Site has referral arrangements for ancillary specialty care and inpatient care MOUs	Select...	Select...	
Site is in compliance with all NHSC R&R assistance requirements	Select...	Select...	
Site is located in and/or serving the population of a federally designated HPSA	Select...	Select...	
Site provides culturally appropriate primary healthcare services	Select...	Select...	
Site requirement and retention plan is approved by board of directors (if applicable) on site for review	Select...	Select...	

**RECOMMEND SITE FOR APPROVAL?\***

☐ Yes ☐ No ☐ Requires NHSC Review

Comment\*:

Upon clicking the "Submit Recommendation" button, this recommendation will be forwarded to the appropriate NHSC Regional Officer for approval.

**SAVE FOR LATER** **SUBMIT RECOMMENDATION**



## Bureau of Clinician Recruitment and Service

### Site Administrator Portal – Submit NHSC Site Application User Guide **DRAFT**

#### Site Verification Table:

The site verification table lists the key criteria required for NHSC eligibility. The PCO cannot submit a recommendation without a completed verification table.

For each criterion (row):

1. Select a verification method used to verify the criteria
2. Select the verification outcome

Verification Methods	Allowable Outcomes
Site Visit, Phone Call, Email, Other Communication, Supporting Documentation	Verified Not Verified Not Applicable Unknown Deferred
Not Applicable	Not Applicable
Did Not Verify	Not Verified Unknown Deferred
Defer to NHSC	Deferred

Item	Verification Method	Verification Outcome	Last Modified By
Site adheres to sound fiscal management policies	Select... ▼	Select... ▼	
Site did provide PCO with documentation needed to determine compliance	Select... ▼	Select... ▼	
Site has a sliding fee schedule signage posted notices and Medicare Medicaid SCHIP enrollment	Select... ▼	Select... ▼	
Site has credentialing documentation	Select... ▼	Select... ▼	
Site has referral arrangements for ancillary specialty care and inpatient care MOUs	Select... ▼	Select... ▼	
Site is in compliance with all NHSC R&R assistance requirements	Select... ▼	Select... ▼	
Site is located in and/or serving the population of a federally designated HPSA	Select... ▼	Select... ▼	
Site provides culturally appropriate primary healthcare services	Select... ▼	Select... ▼	
Site requirement and retention plan is approved by board of directors (if applicable) on site for review	Select... ▼	Select... ▼	

